Quick Reference Guide:

End of Year Collection

This guide provides instructions for creating 16-17 calendars, rolling student enrollments to the 16-17 year (if applicable), and ending student enrollments for the 15-16 year, including the entry of graduation data.

Topics in this Quick Reference Guide include:

- *Creating Calendars*
- *Enrollment Roll Forward*
- *Enrollment End Batch*
- *Using a District's Student Information System to Complete End of Year Requirements*
- *Enrollment Adjustments*
- *EOY State Published Ad Hoc Reports*
- *Resync Data*

For more information:

[AIM Entry Scenarios and Examples](#)
[AIM Exit Scenarios and Examples](#)

For specific questions, call the OPI AIM Helpdesk at 1-877-424-6681 (1-877-4AIMMT1) or 444-3800.

The End of Year Collection completes enrollments for the closing year and begins the process of enrolling students for the 16-17 year.

Schools create calendars for the 16-17 school year and have the option of pre-enrolling students for the next year.

Closing year enrollments may be ended in a batch (using Infinite Campus tools) or may be ended using the File Upload process. This collection ends June 17, 2016.
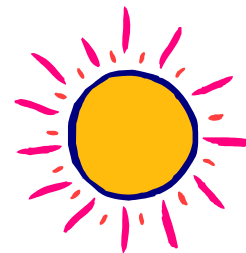
Before beginning this process, there are a few considerations:

1. **How do I create new calendars for the 16-17 year?**
   - Districts may use the Calendar Wizard tool to create calendars for the next school year. *page 2*
2. **May I automatically roll over enrollments for next year?**
   - Districts have the option to use the Enrollment Roll Forward tool to create enrollments for the 16-17 school year. *page 7*
3. **May we end all student enrollments at the end of the year, or do we have to do them individually?**
   - Districts have the option to use the Enrollment End Batch tool to end all student enrollments at once. *page 12*
4. **May I use the Enrollment End Batch tool to enter graduation data?**
   - The Enrollment End Batch tool may be used to enter graduation data for students. Students who do not graduate (or graduate late) need their records changed manually. *page 14*
5. **We only have grades K-8 in our district. What do we do with our 8th grade students?**
   - Students who have completed all the grades in a district should be exited using the Enrollment End Batch tool. K-8 students do not have graduation data entered. *page 13*
6. **May I use our district's Student Information System to complete this collection?**
   - A district may use the File Upload process to complete the End of Year collection. However, the Calendar Wizard Tool must be used to roll Calendars forward. *page 16*
7. **What should I do if I roll a student forward then later find out they are not returning?**
   - Student enrollments will have to be adjusted manually if students do not return the following year.
8. **What should I do with PK students?**
   - PK students should be rolled forward manually. *page 10*

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End of Year Collection

Step 1: Creating New Year Calendars

From the **Index**, select **System Administration**, **Calendar** and *Calendar Wizard*.

Select *Create new Calendars by rolling forward selected data (last year's data will be added to a newly created calendar).*

Click **Next**.

Select 16-17 from the *Year* drop down box.

The *Name Template* should be [year] [schoolname].

Enter "1" in the *Number* field.

Enter the *Start* and *End Date* (Choose the state fiscal year start and end dates).

Select the *Calendar(s)* from the previous year to roll forward

Click **Next**.

End of Year Collection

NOTE: Roll all the calendars in the district at once by using the multiple select feature. If there is more than one calendar in a school (e.g., a K-6 calendar and a PK calendar) each calendar must be given a different name. Please contact the OPI AIM Helpdesk at 1-877-424-6681 for assistance.

Check the appropriate boxes to copy data from last year's calendar to this year's calendar. It is recommended to check all boxes (*Days* and *Day Events* cannot be checked).

For instance, while you may have a new course numbering system in the New Year, or other changes to the New Year calendars, it is easier to change those after you copy the old calendars than to re-enter all new courses.

Copy, Rollforward, or Create new Calendar-linked Data
This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an schedule names in the new calendar.
Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow d

Pick the Data to Copy
☑ Calendar Attributes
☑ Schedule Structures
   ☑ Term Schedules
     (NOTE: Term dates will not roll if they fall outside of the calendar start and end dates.)
   ☑ Period Schedules
   ☐ Days
     ☐ Day Events
☑ Grade Levels
☑ Courses
   ☑ Sections w/ Schedule Placement
     ☑ Teacher Assignments
     ☑ Section Staff Assignments
     ☑ Room Assignments
   ☑ Grading Tasks & Credits
     ☑ Composite Grading
   ☑ Scheduling Rules
   ☑ Schedule Building Constraints
☑ Attendance Excuse Codes
☑ Scheduling Teams
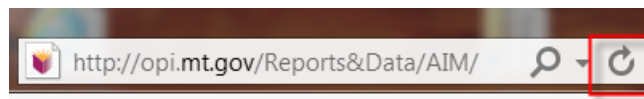   ☑ Section Team Assignments
☑ Calendar Overrides

[Run Wizard]

[< Back] [Next >]

Click **Run Wizard**.

Scroll to bottom of **Progress** box to verify the Wizard is complete.

When the Wizard is complete, refresh the page.

- Internet Explorer: Refresh or F-5

- Firefox: Reload or Crtl+R

Progress
0 Sections copied.
0 Section Placements copied.
0 Teaching Section Assignments copied.
Course Fees copied.
0 Staff Section Assignments copied.
0 Scheduling Rules and 0 Planning Rules copied.
0 Build Constraints - Course Placement - copied.
0 Build Constraints - Course Room - copied.
0 Build Constraints - Course Teacher - copied.
0 Build Constraints - Room Placement - copied.
0 Build Constraints - Teacher Placement - copied.
0 Grading Tasks and Credits copied.
0 Composite Grading entries copied.
0 Calendar Overrides copied.
0 Assessments copied.

Complete

[< Back] [Next >]
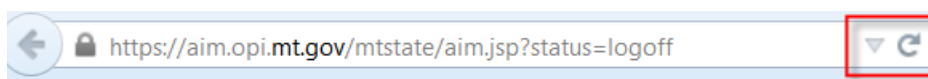
http://opi.mt.gov/Reports&Data/AIM/

https://aim.opi.mt.gov/mtstate/aim.jsp?status=logoff

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AIM
Achievement in Montana
Montana's State Student Information System

Montana
Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

End of Year Collection

At the top of the screen, select the 16-17 school *Year* and a *School*.

From the **Index**, select **System Administration**, **Calendar** and *Calendar*.

Verify the *Start* and *End Dates* and calendar *Number* (can be 1 for every school in the district – must be unique if there is more than 1 calendar per school).

Click *Save*.

Note for District Edition users only: "Student Day (instructional minutes)" is used in the ADA calculations. If left blank, will default to 360. And calculated ADA will be different between enrollment and ADA report.

Select the **Grade Levels** tab.

Verify grades for the school.

If grades are not correct for the school, contact the OPI School Finance Division at (406) 444-4524 for assistance.

NOTE: Do not add or reconfigure grade levels for schools (e.g., adding grade 6 to your 7-8 calendar) without first alerting OPI of the need for the change.

NOTE: Seq numbers between grades must be one higher than the grade and in order. This allows students to roll forward to the next grade in the sequence.

End of Year Collection

Select the **Schedule Structure** tab.

There should be one Schedule Structure: *Main.*

Select the **Terms** tab.

If a Term Schedule exists, click the name of the term (e.g., Full Year). Enter the *Start Date* and *End Date* for the 16-17 school year (these are student instructional start and end dates).

Click **Save Term Schedule/Terms**.

If a Term Schedule does not exist, click **New Term Schedule/Terms**. Select the *Term* and click **Create Terms**. Follow the instructions above to enter term dates.

Note: At least one term is required. It is recommended to enter semesters at least (or trimesters, if applicable).

End of Year Collection

OPTIONAL

Select the **Periods** tab.

Under **Period Schedule/Periods Editor**, select the name of the period schedule (e.g., Default) to open the screen. Verify the times for each period.

To add a new period, click **Add Period**.

To modify an existing period, change the *Name*, *Sequence*, *Start Time*, *End Time*, *Lunch Time* or check *Non-Instructional*.

Click **Save Period Schedules**.

OPTIONAL

Create a school calendar using the **Days** tab.

Select the **Days** tab.

Click **Day Reset**. Enter the Instructional *Start* and *End Dates*. Click the days of the week that school is in session.

Click **Create Days**.

Enter Non-Instructional and PIR dates.

Click the selected date. Enter or remove information as necessary.

Example:

PIR day - Un-check *Instruction* and *Attendance*, click **Add Day Event**, and for *Type* enter *IS: In Service*. Click **Save Day/Day Events**.

Select the **Print** icon to view the calendar.

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End of Year Collection

Step 2: Creating enrollments for the 16-17 school year - ENROLLMENT

Before using the Enrollment Roll Forward tool, modify the enrollments for any students who are not continuing in the 16-17 school year, including transferring students and students who are being retained at their current grade level. This must be done before using the Enrollment Roll Forward tool, so that the student is not advanced a grade in the process.

This section shows how to enter End Date and End Status for transfers and other non-continuing students, how to indicate that a student has been retained, and how to manually enroll a retained student in the 16-17 school year.

Transfers

Use the 15-16 school year.

Using the **Search** tab, find the student.

Click the **Enrollments** tab.

The End Status appears on the **Enrollments** tab. *If it does not display the correct End Status for a student who transferred, modify the record to add the transfer End Status.*

Click the record for 15-16 to edit it.

Click the 15-16 enrollment record to open the enrollment screen.

Transfers and Withdrawals -- Enter *End Date and End Status* to describe the transfer or other reason the student will not be enrolled the following year.

Click *Save*.

End of Year Collection

Retained Students

Retained students must be manually entered in the next year's enrollment, since they do not roll over in the automated process.

Click on the 15-16 enrollment record to open the screen. Enter the *End Date* and *Status* (*100: End of Year…*).

Click **Save**.

To enter a manual enrollment for a retained student, change the Calendar *Year* to 16-17 and select the appropriate school. Click **New**.

Enter the student's 16-17 *Grade*, *Start Date* and *Start Status* (02: Continued enrollment same school, no interruption).

Click **Save**.

End of Year Collection

Rolling Forward Students to the Same School in District – NON PK STUDENTS

From the **Index**, select **System Administration>Student>Enrollment Roll Forward**.

1. Select one 15-16 calendar (source calendar) from which to roll forward the enrollment.
2. Choose the *Grade(s)* that will be continuing in that school (e.g., if a 7-8 school, choose grade 7 only).
3. Choose all *Service Type(s)* listed to roll forward all students.
4. Choose the *Source Structure* (Main).
5. Select the *Start Status* for the 16-17 school year (*02: Continued enrollment same school, no interruption).*
6. Choose the *Destination Calendar* for the 16-17 school year. Same school as step #1.
7. Choose the *Destination Grade* (not required – students will automatically be advanced to the next grade in sequence – sequences must be set ahead of grades, i.e., Grade KF is Seq 1, grade 1 is Seq 2).
8. Choose the *Destination Structure* (Main).
9. Enter the first day of instruction for students in this grade level.
10. Click *RUN TEST*.
11. If *RUN TEST* returns acceptable enrollment counts, grade levels and schools, click *RUN.*
    a. If *RUN TEST* returns **unacceptable** counts, review Calendar End Dates, Grade Levels and Sequences and selections in the Enrollment Roll Forward screen.

~Repeat for each school.

End of Year Collection

Rolling Forward Students to the Same School in District – <u>PK STUDENTS</u>

1. PK students should be rolled over manually.
2. Select 15-16 year.
3. Select *Search* tab> select *Student*   Click *Advanced Search*.
4. Select *Grade PK*   Click *Search*.
5. A list of the current year PK students appears to the left. Change the year to 16-17.
6. Click the name of a student.
7. Click on the *Enrollment* tab.
8. Click *New*.
9. Enter the next year's *Start Date* and *Status* and the *Grade* level.
10. If the student is continuing in PK be sure *Service Type* is set to *N: Special Ed Services*.
11. If the student is entering Kindergarten, be sure the *Service Type* is set to *P: Primary*.
12. Click *Save*

End of Year Collection

Rolling Forward Students to a New School in District

(e.g., roll students from middle to high school)

From the **Index**, select **System Administration>Student>Enrollment Roll Forward**.

1. Select one 15-16 calendar (source calendar) from which to roll forward the enrollment.
2. Choose the *Grade*(*s*) that will **NOT** be continuing **in that school** (e.g., if a 7-8 school, choose grade 8 only).
3. Choose all *Service Type*(s) listed to roll forward all students.
4. Choose the *Source Structure* (Main).
5. Select the *Start Status* for the 16-17 school year (*04: Transfer from public school in district or state*).
6. Choose the *Destination Calendar* for the 16-17 school year. Should be the calendar of the next school.
7. Choose the *Destination Grade* (not required – students will automatically be advanced to the next grade in sequence – sequences must be set ahead of grades, i.e., Grade KF is Seq 1, grade 1 is Seq 2).
8. Choose the *Destination Structure* (Main).
9. Enter the first day of instruction for students in this grade level.
10. Click *RUN TEST.*
11. If *RUN TEST* returns acceptable enrollment counts, grade levels and schools, click *RUN.*
    a. If *RUN TEST* returns **unacceptable** counts, review Calendar End Dates, Grade Levels and Sequences and selections in the Enrollment Roll Forward screen.

~Repeat for each school.

Hint:

Select grades to roll forward based on their start status in the upcoming school year.

Enrollment Roll Forward - Test Mode

Destination Calendar/Grade
   14-15 Hardin Primary 02 rolled to 15-16 Hardin Intermediate(Main) 03 Students: 127

* Student's enrollment ended on the last day of the term

End of Year Collection

DO NOT CONTINUE TO THE NEXT STEP UNTIL YOU HAVE COMPLETED THE ENROLLMENT ROLL FORWARD PROCESS (pages 7-11) FOR GRADES K-11. The Enrollment Roll Forward must be completed before running this Enrollment End Batch process.

Step 3: Enrollment End Batch Process

From the **Index**, select **System Administration**>**Student**> *Enrollment End Batch*

CONTINUING STUDENTS: Same School

This step ends the 15-16 enrollments by adding an End Date and Status for each student that will continue in the same school next year.

Select a 15-16 *Calendar*.

Select the *grade*(*s*) that will continue in that school next year (e.g., for a PK-6 school, select grades PK-5 because grade 6 goes to another school next year.).

Enter *End Date* and *End Status* (*100: End of year, returning to same school next year*).

Click *Run*.

Select Calendars

15-16 Crow Agency School
15-16 Fort Smith School
15-16 Hardin High School
15-16 Hardin Intermediate
15-16 Hardin Middle School
15-16 Hardin Primary
14-15 Crow Agency School
14-15 Fort Smith School
14-15 Hardin High School
14-15 Hardin Intermediate
14-15 Hardin Middle School
14-15 Hardin Primary
13-14 Crow Agency School
13-14 Fort Smith School
13-14 Hardin High School

CTRL-click and SHIFT-click for multiple

Select Grades

☐ 01   ☐ 02   ☐ 03   ☑ 04   ☑ 05   ☐ 06   ☐ 07
☐ 08   ☐ 09   ☐ 10   ☐ 11   ☐ 12   ☐ KF   ☐ KH
☐ P1   ☐ PK   ☐ UE   ☐ UH   ☐ UM

Select Ad Hoc Student Filter

Select Fields to fill

End Date	06/05/2015
End Status	100: End of year, returning to same school next year
End Action	▼

Graduation

Diploma Date	
Diploma Type	▼
Diploma Period	▼
Post Grad Location	▼
Post Grad Plans	▼

[RUN]

End of Year Collection

CONTINUING STUDENTS: Advancing to another school in district.

This step ends the 15-16 enrollments by adding an End Date and Status for each student who will advance to another school in the district next year.

Select a 15-16 *Calendar*.

Select the grade that will advance to the new school next year (e.g., for a middle school, select grade 8).

Enter *End Date* and *End Status* (*110: Promoted to another school in the same district*).

Click *Run*.

NON-CONTINUING STUDENTS: Students who have completed all the grade levels in a district (school is K-6 or K-8 only) and will advance to another district

Select a 15-16 *Calendar*.

Select the last available grade in the district.

Enter *End Date* and *End Status* (*140: Transfer to another public school in district in MT*).

Click *Run*.

Note: Do **not** enter graduation data for these students – graduate data is only entered for students in grade 12.

End of Year Collection

HIGH SCHOOL SENIORS: GRADUATES

This step ends the closing year enrollment for all students in 12th grade by entering graduation information to the batch. After running this wizard, manually adjust the enrollment for any individual student who did not graduate (continue to next section for instructions).

Select the 15-16 *Calendar* for the high school. Select only *Grade* 12.

Enter the *End Date* (last day of school for seniors), *End Status* (*400: Graduated*), *Diploma Date*, *Diploma Type* (*01: Regular Diploma*) and *Diploma Period* (*03: Four years, or with IEP allowing for longer*).

Click **Run**.

Repeat this for each high school of the district.

To modify a record for an individual senior who did not graduate, choose 15-16 school year, search for the student using the **Search** tab.

Click the **Enrollments** tab. Click the student's 15-16 enrollment record to open it.

Change the *End Status from 400: Graduated* to *100: End of year, returning to same school* or other appropriate status.

Click **Save**.

End of Year Collection

Select the **Graduation** tab: Index> Student Information>General>> over to tabs under student name>> Graduation

- If the student did not graduate, remove the *Diploma Date*, *Diploma Type* and *Diploma Period*.

OR

- If the student did not graduate in four years, change just the *Diploma Period*.

Click **Save**.

Note: Post Grad Location and Post Grad Plans are not required.

NOTE: The *following instructions pertain only to those districts that use a file upload* for ending their current enrollments and creating next year's enrollments.

Final steps for all districts can be found on page 17.

END OF YEAR PROCESS – for DISTRICTS USING A FILE UPLOAD PROCESS

Some student information systems create an upload file to complete the data collection described in this guide (except calendar set up and verification, which must be done manually in AIM (see page 2). Contact your student information system vendor for End of Year instructions. Follow their instructions to create an AIM enrollment upload file from your district's student information system.

NOTE: Please follow your local student information system instructions carefully. Failure to follow the instructions provided by your vendor may result in an inability to successfully upload 15-16 enrollment End Dates.

End of Year Collection

FILE UPLOAD TO AIM

From the **Index**, expand **MT State Reporting**. Select *MT Data Upload*.

From **Import Type**, select *Enrollments*, **Work to Perform**, *Validate and Test File*, and browse for the enrollment file from your district's Student Information System.

Click *Upload* to test and validate the file.

This may be done twice.

Fix any errors identified on the **Import Results Summary**.

Return to **MT State Reporting/ MT Data Upload**. Select **Import Type:** *Enrollments*, **Work to Perform:** *Load Partial File*. Browse for the file.

Click *Upload* to upload the file into AIM.

End of Year Collection

VERIFY DATA USING AD HOC REPORTS

Verify data with State Published Ad Hoc Report: student EOY 2015-16 Missing End Date or Status.

Select *Index>Ad Hoc Reporting>Filter Designer >>* expand *State Published>* select *student EOY 2015-16 Missing End Date or Status.*

Click *Test*

This will provide a list of students that are missing their Enrollment End Date and Status. All students must have an end date and status. Correct as needed. **If no results, all data is entered. No action necessary.**

RESYNC STATE DATA

A data resync is required for all file uploads and recommended before data collection due dates.

Select the current *Year* and *All Schools*.

Select **Index>System Administration>Data Utilities>Resync State Data**.

Check the box for **Enrollment**. All associated boxes will automatically populate.

Click **Send Resync**.
(At bottom of page.)

End of Year Collection

Thank you for all you do and please

don't hesitate to contact the AIM Help Desk at

877-424-6681 or 406-444-3495 and/or email

opiaimhelp@mt.gov with any questions or concerns.

End of Year
Collection